Unlocking Golf's True Potential

Global Customer Insights

The Global Economic Value of Increased Female Participation in Golf

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Unlocking Golf's True Potential

Syngenta is a global agriculture company, employing more than 28,000 people in 90 countries.

For more than 30 years we have also been a market leader in the global golf industry creating innovative turf management solutions for golf courses in 43 countries.

As an industry leader, we care not only for the health, quality and consistency of your fairways and greens, we care about the health of the game itself and the industry's long-term business sustainability.

That's why Syngenta is investing in golf from the ground up with the aim of Unlocking Golf's True Potential. Our objectives are focused on:

Playability

Working with golf course superintendents around the world to deliver the best playing conditions for their customers

Productivity

Supporting our customers and stakeholders with new knowledge, skills and tools to create strong, dynamic, customer-centric golf businesses

Sustainability

Enhancing the environment, increasing biodiversity, and engaging with customers and stakeholders

Working together, we can Unlock Golf's True Potential

To find out more, join Syngenta Golf Ambassador Carin Koch for a special on-course video presentation at: **www.unlockinggolfstruepotential.co.uk**

Dear Reader,

Welcome to 'The Global Economic Value of Increased Female Participation in Golf', the first in a new series of Global Customer Insights reports commissioned by Syngenta.

We believe this is the first market study to address the opportunity of female participation on a global scale. More than 14,000 respondents in eight countries including the United States, the UK and Japan completed our survey, conducted by an independent international market research company.

For the first time, we have been able to assess worldwide latent demand for golf among women and estimate the potential economic value to the global golf industry.

We present customer insights that inform practical solutions on how to retain and optimize the value of existing female golfers, as well as how to recruit new customers.

This survey has also given us the opportunity to examine the perceived link between females and juniors to see if women could be more effective than men at bringing their children to golf and whether there is a Female-Junior multiplier effect in terms of participation.

Globally, approximately a quarter of existing golfers are female. Yet, as our survey shows, millions of women worldwide could be interested in taking up golf within the next two years.

This is a huge opportunity for the golf industry. However, realizing this opportunity requires golf to listen to and address the specific needs of its different customers.

Gender diversity is good for sport – and it is good for business. It is also something that a modern, globalized society expects.

As an industry, golf has become increasingly aware of the need to address gender diversity and there are some excellent female-centric participation initiatives in place. However, more can be done.

A target of 30% for worldwide female participation in golf would be a good start, but why not 50%? As an industry, I believe this is a target we should aspire to.

We hope this report and our upcoming series provides insights that can be turned into positive action.

We welcome your feedback and ideas. Please do contact us at: golf.syngenta@syngenta.com

Jeff Cox
Syngenta Global Head of Lawn & Garden

"As a professional golfer who has been fortunate enough to travel all around the world, I know that golf is a game with global appeal to both men and women. I also know, as a mother of two children, that golf is a wonderful way to share time with family.

I'm very proud to be working with Syngenta, helping turn market research into action with **love.golf**, a social group coaching program designed specifically for women (see page 19). Introducing this to Sweden in the past year, I've been amazed at the responses of both coaches and customers to a completely different way of bringing new female golfers to the game. While it's social and relaxing, it is also empowering and confidence-giving. For me, it has underlined the value of listening to what people want and not just doing what we have always done in golf. So please read and reflect on this report and use the information to do something at your golf course or in your golf business that will bring more women and families into the game."

Carin Koch
Syngenta Golf Ambassador

Contents

Methodology

More than 14,000 people participated in this worldwide survey, including golfers (female and male), female non-golfers, lapsed female players and women who had tried the sport two or three times but then gave up.

The survey was carried out in eight countries/regions – USA, Canada, UK & Ireland (combined), Sweden, France, South Korea, Japan and Australia.

Some mature golf markets, notably Germany, were not included in this study, but our sample of eight countries represents 78% of the world's total golf course supply (NGF 2016).

Clearly, total latent demand, and therefore the potential economic value of increased female participation globally, could actually be significantly higher if additional countries with golf courses were included. Furthermore, this survey does not take into account potential future demand for golf in countries where both the number of golf courses and the population is growing.

However, focusing on eight mature golf markets that currently account for the majority of the world's golf supply was a practical approach to tackling a golf study of this scale.

Covering North America, Europe and Asia, this is both a broad and representative global study with a margin of error in each country of less than 2%.

The quantitative study included almost 5,000 research hours and was supplemented by qualitative questions and comments, as well as two face-to-face focus groups.

We believe it to be one of the largest in-depth global golf studies ever undertaken and the first to look at the economic opportunity of increased female participation worldwide.

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The Economic Value of Female Golf

How many female golfers are there and what proportion of the total number of adult golfers do they account for? We wanted to create an overview of golf participation worldwide. We also wanted to map latent demand and show the prospective number of female golfers in each of our eight sample markets.

Global Female Participation*

MARKET	FEMALE GOLFERS (%)	FEMALE GOLFERS (MILLIONS)
USA	23%	5.50
Canada	30%	1.71
UK & Ireland	16%	0.16
Sweden	29%	0.12
France	28%	0.10
Japan	23%	1.75
South Korea	29%	1.54
Australia	21%	0.25
TOTAL	**24%**	**11.14**

*Total number of adult female golfers in each market, rounded to nearest thousand. Proportion of female golfers expressed as a split of adult male/ female golfers: junior players excluded.

24%
PROPORTION OF FEMALE GOLFERS

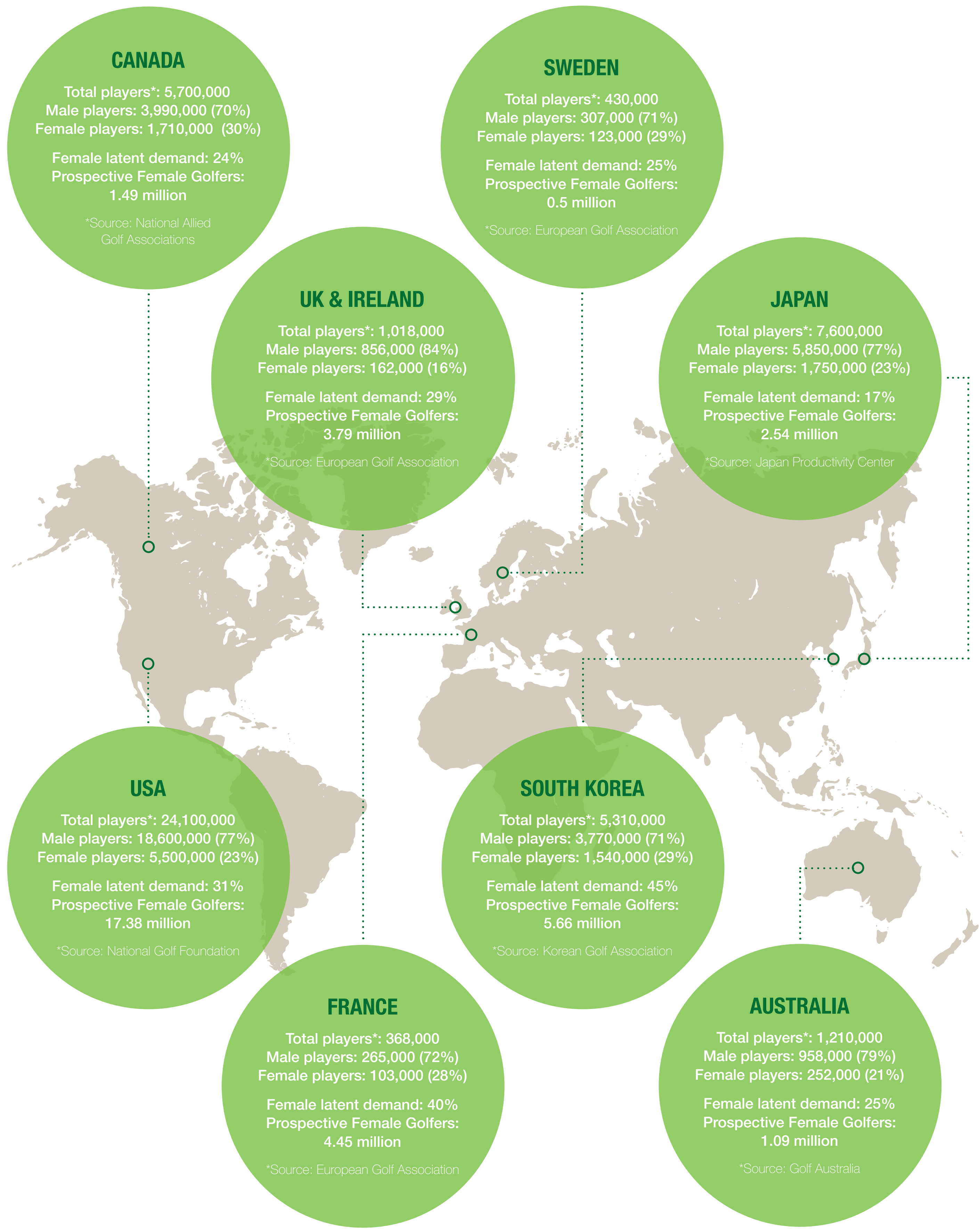
Global Latent Demand

We surveyed female non-golfers aged 18-64 in our eight sample markets about their level of interest in golf. The below is the proportion of females who said they are 'very interested' or 'interested' in taking up golf in the next two years, as well as the equivalent number of prospective female golfers in those countries based on population size.

In total, 29% of non-golfers and lapsed players we questioned said they would be very interested or interested in taking up golf in the next two years, equivalent to 36.9 million prospective new female customers.

MARKET	LATENT DEMAND (%)	PROSPECTIVE FEMALE GOLFERS (MILLIONS)
USA	31%	17.38
Canada	24%	1.49
UK & Ireland	29%	3.79
Sweden	25%	0.50
France	40%	4.45
Japan	17%	2.54
South Korea	45%	5.66
Australia	25%	1.09
TOTAL	**29%**	**36.9**

36.9 MILLION
LATENT FEMALE GOLFERS



What is the Value of the Female Golfer?

To calculate the global economic value of increased female participation in golf, we needed to understand the value of an individual female golfer.

A total of 3,271 female golfers were asked a series of questions based on their expenditure in the past year (2016). This included six expenditure categories.

Naturally, expenditure varies from customer to customer and country to country. However, the data enabled us to create a picture of the female golfer and a mean annual spend value:

Insight: Comparing current male and female players in our survey, men typically spend more than women on golf each year, especially in terms of green fees ($424), but only slightly more on equipment ($256). However, women spend nearly 25% more than men on golf lessons. The amount a new female golfer might spend in her first year may be more or less than our valuation of $949. However, we believe this to be a reasonable valuation.

What is the Global Economic Value of Increased Female Participation?

With the equivalent of 36.9 million women saying they would be 'very interested' or 'interested' in taking up golf in the next two years, what is the potential economic value of these new customers to golf globally?

$35 BILLION

GLOBAL ECONOMIC VALUE OF INCREASED FEMALE PARTICIPATION

MARKET	LATENT DEMAND VALUE ($ BILLION)
USA	16.49
Canada	1.41
UK & Ireland	3.60
Sweden	0.48
France	4.22
Japan	2.41
South Korea	5.37
Australia	1.03
TOTAL	**$35.01**

Insight: The United States has by far the highest number of prospective female golfers (equivalent to 17.38 million players) and, accordingly the largest economic opportunity ($16.5 billion). South Korea and France both have significantly higher than average levels of latent demand, 45% and 40% respectively. Of course, the reality is that only a fraction of these prospective customers will actually take up the game, for a variety of reasons, including some of the perceived and real cultural challenges golf faces, as well as mixed success in converting players who sample the game. However, what the numbers underline is a very significant and strong interest among women in golf – and if the industry can address the needs of prospective female customers and proactively develop its value proposition, there is a global $35 billion opportunity available.

Realizing the Value of Female Golfers

Long-term business sustainability requires the global golf industry to (i) retain existing players and (ii) recruit new customers. We asked female golfers and lapsed players worldwide what would encourage them to play more or start golf.

(i) Retaining Existing Golfers

Will Golfers Play More or Less this Year?

We asked 3,271 female golfers how much golf they would play this year compared to last year.

A total of **87%** said they would play the same amount or more, suggesting most female players are gaining value from their golf experiences. Nearly a third, **30%**, said they would actually play more next year while more than half, **57%**, said they would play the same amount. However, **13%** said they would play less.

We then asked golfers the reasons for the amount they would play in the coming year.

"It is something social that the whole family enjoys, so we go golfing when we have time available."

"I might play a little bit more because now I have two kids and I'm sure they would love to get on the course and run around and play as I play golf."

"I have really found it to be something I enjoy doing and would like to see if I can improve my game."

What would Encourage Golfers to Play More?

We then asked golfers the specific factors that would encourage them to play more next year.

- **37%** The game was more affordable
- **22%** Better weather
- **17%** The game took less time
- **16%** A club or course closer to my home
- **15%** If I could see more improvement in my game
- **14%** My spouse/significant other played the game
- **13%** Relaxed dress code
- **11%** Play more, save more program
- **11%** Less expensive instruction/coaching
- **11%** New equipment was more affordable

Other notable factors include 9-hole green fee (**10%**), course conditions (**9%**) and my children were able to play with me whenever I play (**7%**).

"As I get older I have become a fair weather player. I live on the coast in the northwest of the United States, so we don't get nice weather so often."

How to Optimize the Value of Existing Female Golfers

We wanted to find out what really matters to female golfers during a golf experience and which amenities and services add the most value to their visit.

Key Customer Touchpoints

We asked female golfers what was most important to them in terms of amenities, products and services. While different customers in different countries have varying preferences, seven standout touchpoints for female golfers worldwide are:

- ✔ **Locker room**
- ✔ **Course website / app**
- ✔ **Course conditions**
- ✔ **Food & beverage facilities**
- ✔ **Valet parking**
- ✔ **Time / flexible play options**
- ✔ **Signage (parking, clubhouse & course)**

Added Value

Next, we wanted to identify the touchpoints that can create (or lose) the most value, depending on whether a golf course has delivered positive or negative customer service. Ultimately, which touchpoints should golf courses focus on?

Customer Service

- **Destroys Value**
- 1. Signage
- 2. Website
- 3. Course
- 4. Clubhouse
- **Creates Value**

Insight: Interestingly, signage – welcoming and directing the customer from the parking lot, to the clubhouse, to the golf course – can add significant value to the female customer's experience. This may be to do with giving women confidence and making them feel comfortable in what is often a male dominated environment. The broader findings underline the need to understand the golf experience from a female perspective and enhance the navigation every step of the way, from the website and booking experience in advance, to customer service in and around the clubhouse. Courses that understand the female customer and can add value through excellent service can also generate more revenue.

Why Do Women Leave Golf?

While some mature golf markets have suffered higher rates of attrition in recent times, we wanted to learn more about golfers who had given up the game ('lapsed players'). We also wanted to hear from customers who had tried golf two or three times but then did not take it up ('non-retained players').

Lapsed Players

We asked 654 lapsed female players why they had stopped playing golf.

- **30%** Overall cost of the game
- **30%** Family responsibilities
- **27%** The time it takes to play
- **19%** Work commitments have not allowed me to play
- **17%** Took up another sport or found another hobby I enjoy more than golf
- **17%** My friends stopped playing golf
- **16%** I did not improve enough to justify continuing play
- **12%** Golf is too slow for me; I need a sport or hobby that is faster
- **9%** The game is too frustrating or difficult
- **8%** I did not have easy access to affordable golf coaching
- **5%** There are too many rules and regulations
- **5%** Staff were intimidating
- **4%** Fellow golfers or members were intimidating
- **3%** Golf lessons or coaching was not female focused
- **2%** Coaching seemed too technical
- **13%** Other

"A lot of time is invested in playing golf and I had children. I needed to spend time with my kids before spending three or four hours on a golf course enjoying myself."

"The people that I was playing with, we were in our twenties. Life just started happening faster and there was less leisure time. Everybody just sort of disbanded and never really got back into it."

Non-Retained Players

We also surveyed 1,214 women who had tried golf but had given up after two or three tries. Why didn't they continue with golf?

- **37%** Overall cost of the game
- **30%** The game was not fun
- **26%** The time it takes to play
- **20%** Took up another sport or found another hobby I enjoy more than golf
- **18%** I did not improve enough to justify continuing play
- **17%** The game is too frustrating or difficult
- **15%** Golf is too slow for me; I need a sport or hobby that is faster
- **12%** Family responsibilities
- **12%** The courses are set up for experienced golfers, not beginners
- **8%** Work commitments have not allowed me to play
- **7%** My friends stopped playing golf
- **7%** The game was too intimidating
- **4%** There are too many rules and regulations
- **8%** Other

"I wasn't very good and I never got any better."

"Golf is very expensive. I would rather spend the money on my children or other sports that are a nominal fee or free."

Insight: Cost is frequently a key factor in consumer surveys for all manner of products and services, so it is not a surprise to see cost at the top of these lists for golf. However, this doesn't necessarily mean golf generally is too expensive or that golf courses and clubs should systematically discount play, which can sometimes be the default reaction of golf venues. Providing solutions that address customer challenges – including family responsibilities, time, flexibility and ability to improve – could enhance the game's value proposition and result in better retention as well as a higher conversion rate among the many who are interested and trying golf for the first time.

(ii) Recruiting New Customers

With significant latent demand, what might be the best ways to recruit new female golfers? Understanding what actually interests new players about the game, how they are first exposed to the sport and what would encourage them to give golf a try, could inform how new golfers are recruited.

Prospective Players

We asked 3,515 non-golfers and lapsed players, 'What about golf piques your interest?'. The most appealing factors to these prospective customers are:

1	Being outdoors
2	Relaxation or stress relief
3=	I can play the game at whatever age I choose unlike other sports
3=	It presents a mental challenge
5=	Spending time with my family and friends
5=	It presents a physical challenge

"When I see golf on TV, it looks so relaxing, and it looks so calm. It looks beautiful."

Insight: Being outdoors and relaxation/stress relief could indicate that golf appeals to prospective customers for its mental health benefits more than physical health, although this factor was also recognized. Our previous research into female golfers, in 2014, indicated that many prospective players simply didn't associate golf as a way of getting physically fit. The golf industry is now actively communicating the physical health benefits of golf and this may well have a positive impact as many consumers are now more attuned to the benefits of walking, including measuring steps using technology.

Exposure to Golf

We also asked how non-golfers and lapsed players had been exposed to golf. Ultimately, this may provide indications of what golf's potential touchpoints are, as well as entry points to the sport.

62%	Television
43%	Friends who golf
24%	Putt Putt/Crazy Golf
17%	My spouse/significant other plays
13%	Work colleagues

"I watch golf on TV so I know a lot of the big names, like Rory McIlroy. But I'll only watch the last day of a tournament. The first three days, they're basically trying to make their place and it's boring."

62%

NON GOLFERS WHO HAD SEEN GOLF ON TV

What would Encourage Women to Try Golf?

We asked 3,368 non-golfers worldwide what would encourage them to give golf a try. They were given 25 different solutions and options and asked to select those that would encourage them to make their first step into golf. Here are the top 10 responses:

74%	Free golf mornings/give golf a try
67%	Easy access to affordable lessons
59%	Relaxed atmosphere
50%	Clubs available for rent/hire so no need to purchase equipment
50%	Introduction to golf lessons taught to a group of peers with similar golfing capabilities
48%	Beginner only mornings
48%	Venue was more accommodating to non-members, juniors and/or beginners
45%	Female-focused coaching on the course as opposed to the range
43%	Play from distances on the course aligned to abilities
42%	More of my friends and family participate in the game

"I would want to start with people who are beginners like me."

"I would like to go with a friend so we could learn together. It would be less intimidating."

74%

NON GOLFERS WHO WOULD BE ENCOURAGED TO TRY WITH A FREE GOLF SESSION

Insight: Non-golfers want to 'test drive' or sample a new sport. While affordability is top of mind, key aspects of accessibility and making the customer feel comfortable at the golf course are important. This includes a relaxed atmosphere at an accommodating venue and the sense of security of learning with a group of similar skill levels. Our qualitative research in both the UK and Sweden indicates that new female golfers frequently do not feel comfortable learning golf one-on-one with a professional on a range, especially if the instruction is technical and/or they feel under pressure from other experienced players who are nearby on the range.

Journey of a New Customer

What is the route into golf for new female players? What are the touchpoints and factors that engage women and then convert them into customers? And what are the traps for golf to avoid?

1 EXPOSURE

FRIENDS & FAMILY

TV

DRIVING RANGE/ MINI GOLF

62% SAID THEY HAD SEEN GOLF ON TV

"I've seen golf on TV while flicking through the channels." **Non-golfer**

LOST CUSTOMERS

- Perception golf is intimidating
- Golf's male culture
- Do not know how to get started

"My dad plays golf, my grandad plays golf, my brother plays golf but no women in my family play golf." **Non-golfer**

2 ENGAGEMENT

SAMPLE GOLF SESSION

AFFORDABLE, RELAXED, SOCIAL GROUP COACHING

RENTAL EQUIPMENT

29% ARE INTERESTED IN STARTING GOLF WITHIN 2 YEARS

"It was helpful having an all female group as you feel less self-conscious." **New golfer**

LOST CUSTOMERS

- Game was not fun
- Did not improve enough to justify continue playing
- Course set up for experienced golfers, not for beginners

"You get too much advice from the pro; it's too technical." **Non-golfer**

3 CONVERSION

FRIENDS

FRIENDLY, HELPFUL STAFF

COURSE CONDITIONS

$949 ANNUAL VALUE OF A FEMALE GOLFER

"Within six months, two of our group have progressed to becoming full members on the 18-hole course." **New golfer**

LOST CUSTOMERS

- Cost
- Time/takes too long (family & work responsibilities)
- Game not enjoyable

"Golf is very expensive. I would rather spend the money on my children than myself." **Lapsed player**

4 ADVOCACY

FRIENDS: FACE TO FACE

FACEBOOK

SMS TEXT

75% WOULD SHARE A POSITIVE GOLF EXPERIENCE BY TELLING FRIENDS FACE-TO-FACE

"I love this sport and to have the opportunity to enjoy it with my family more often makes me very happy." **Golfer**

LOST CUSTOMERS

- Spam marketing from course

"I wasn't very good. I never got any better. It still took me a very long time." **Lapsed golfer**

Did Prospective Golfers Watch Olympic Golf?

Having established that TV is the most common channel for non-golfers to be exposed to the sport, (**62%** of non-golfers said they had seen golf on TV), we wanted to find out how many of our respondents had seen television coverage of golf at the Olympics and whether this had piqued their interest in the game.

We asked 3,515 female non-golfers and lapsed players worldwide **'Did you watch the televised golf in the 2016 Olympics in Rio de Janeiro'?**

In total, **31%** had watched golf at the Olympics on television.

31%
NON GOLFERS WHO WATCHED OLYMPIC GOLF

Of these, **35%** watched one to two hours, **32%** watched two to four hours and **11%** watched more than four hours.

The country where Olympic Golf was most popular, according to our survey of lapsed female players and non-golfers, was South Korea, where **58%** of respondents watched it on television.

1 South Korea – 58%
2 UK & Ireland – 35%
3 Japan – 34%
4 France – 32%
5 Sweden – 31%
6 USA – 27%
7 Canada – 19%
8 Australia – 16%

(It should be noted that Inbee Park of South Korea won the Women's Individual Gold Medal while Justin Rose of Great Britain won the Men's Individual. Other medalists from countries included in our survey were Henrik Stenson of Sweden, Men's Silver, and Matt Kuchar of USA, Men's Bronze.)

We then asked lapsed and non-golfers **'Did watching the Olympic golf pique your interest in the game at all?'** Here are their responses:

27% Yes. I am thinking about trying it

32% Slightly, but I am not sure I will try the game

23% It did, but I am not going to try the game right now

9% Yes. I will not try the game, but I will only watch some special golf events on television

8% No, it did not. I do not find golf to be entertaining on television

Case Study: love.golf Social Group Coaching

What is love.golf?

love.golf is a female golf coaching programme with a difference.

Based on market research and academic study, the program is focused on social, group coaching. Rather than just standing on a practice range, the new female golfers primarily learn and acquire new skills while playing on the course.

Unlike traditional golf lessons, which many new female customers find off-putting because of their sometimes overly technical and monotonous nature, the coach is re-positioned as a facilitator of a relaxed and enjoyable playing experience.

The program was developed by PGA Fellow Professional Alastair Spink during his academic study at the University of Birmingham in the UK. The development of the **love.golf** program is being supported by Syngenta.

What are the benefits?

"Empowerment and self confidence is really what makes this work," explains Alastair Spink, who has introduced more than 300 women to golf at Fynn Valley Golf Club in the east of England, where he is based.

"I was watching women come to the practice range and seeing them ask their husbands or partners if they could have a go, and then observing the male player dispense every bit of golf instruction knowledge he had. Typically, the woman sat down after five minutes having probably only hit two or three shots. That was it – that was their experience of golf, and they hadn't even set foot on a golf course."

Spink developed a six-week introductory program focused on an all-female, social group golf experience. No dress code, no rules, just an assuring, guiding presence from the coach and an experience that he says allows women to 'fall in love with the game'.

"What's remarkable is that the less I said, the quicker they learned and improved," says Spink. "When you have a group who are helping, supporting and encouraging each other, the learning dynamic is incredible."

Results

- 25 UK & 5 Swedish coaches participated in pilot program in 2016
- 90% of customers retained into follow-on programs
- **love.golf** set for commercial roll-out in 2017

To find out more and to watch videos about the program, visit: **www.love.golf**

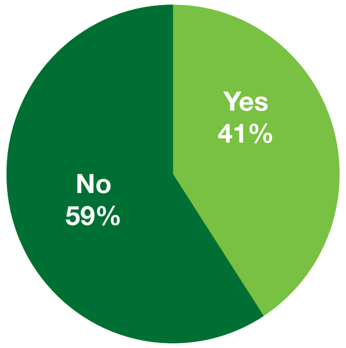
Love.golf
TRY IT LOVE IT

Could Female Golfers be a Catalyst for Junior Participation?

It's frequently said that if a female starts in golf, the chances are her children will end up playing, too. There may be some anecdotal evidence to support this, but we wanted to determine if there was a link and, if so, could it be evaluated. Could mothers be more effective at introducing their children to the game than golfing fathers? Ultimately, could new female golfers be a key to unlocking even more value in golf?

First, we asked female golfers if their children played golf and, if so, with whom?

Do your children play golf?



With whom do your children primarily play golf?

39% They primarily play with me

23% They primarily play independently from myself or my spouse/significant other

20% We primarily play as a family

18% They primarily play with my spouse/significant other

Girls Golf, a joint LPGA and USGA junior program, has grown into a community of more than 50,000 girls.

A Female-Junior Multiplier Effect?

Next, we wanted to evaluate the impact gender has on bringing children to the golf course.

Analyzing the data of 3,271 female golfers and 3,492 male golfers, we found that female golfers are 38% more likely to bring their children along to play golf with them.

Evidently, recruiting more female golfers results in even more juniors playing golf. In fact, if 1,000 new female golfers are recruited, they will bring up to 720 more potential new golfers than if 1,000 new male golfers had started the game (based on 1.9 children per female).

What's the Potential?
Understanding this multiplier effect with women, we calculated the absolute potential for junior players based on 1) today's current female players and 2) new female players based on latent demand in each market. (Fertility rates in each country were factored into the calculation).

25 MILLION POTENTIAL NUMBER OF CHILDREN PROSPECTIVE FEMALE GOLFERS COULD INTRODUCE

MARKET	FERTILITY RATE (CHILDREN PER WOMAN)*	POTENTIAL JUNIOR GOLFERS FROM CURRENT FEMALE PLAYERS (MILLIONS)	POTENTIAL JUNIOR GOLFERS FROM LATENT FEMALE PLAYERS (MILLIONS)
USA	1.89	3.95	12.48
Canada	1.61	1.05	0.91
UK & Ireland**	1.92	0.12	2.77
Sweden	1.92	0.09	0.36
France	2.00	0.08	3.38
Japan	1.40	0.93	1.35
South Korea	1.26	0.74	2.71
Australia	1.92	0.18	0.80
TOTAL		**7.13**	**24.76**

*United Nations, World Population Prospects (2010-2015)
**Based on UK rate of 1.92 (Ireland 2.01)

Of course, both today's female golfers and new latent golfers may not be of child bearing age. Also, some current female players' children are actually already playing golf. These figures represent the absolute potential of females, current and prospective players, to introduce their children to golf.

Insight: There is already industry research showing the retention and long-term value of junior golfers. What is evident here is that recruiting women with children could add significant immediate and long-term value to golf. It also opens the possibility of thinking about the recruitment of juniors through mother-and-child products, not solely junior golf. Equally, 59% of the female golfers with children who play golf said their children play primarily with them or as a family. Currently, the #1 reason female golfers give up the game is family responsibilities, as well as cost, yet spending time with friends and family is one of the greatest attractions of golf. Could developing more family golf products or opportunities be an effective solution for golf courses?

Global Customer Insights Summary

In this study, we have attempted to set out and evaluate what we believe is a hugely significant opportunity for the global golf industry, namely increased female participation.

While this report covers a range of topics, challenges and solutions, and draws on a mass of in-depth data from 14,000 respondents in eight countries/regions, we have focused on evaluating economic benefits relating to growing the number of women playing golf. Key findings include:

1. The Economic Value of Increased Female Participation

- **24%** Female golfers as a proportion of current players
- **Outdoors, relaxation, time with friends and family:** golf's appeal factors for women
- **29%** non-golfing females 'very interested' or 'interested' in taking up golf in the next two years
- **$949** Annual value of a female golfer
- **37 million** Latent female golfers in eight markets
- **$35 billion** Global economic value of increased female participation

2. Realizing the Value of Female Golf

- **37%** Female golfers who would play more if the game was more affordable
- **17%** Female golfers who would play more if the game took less time
- **30%** Proportion of women who cite family responsibilities as reason for stopping
- **62%** Proportion of non-golfers who have seen golf on TV
- **30%** New golfers who said golf was not fun and stopped after two or three tries
- **74%** Non-golfers who would be encouraged to give golf a try with a free session

3. Female Golfers as a Catalyst for Junior Participation

- **41%** Female golfers with children who play golf
- **59%** Female golfers whose children either play primarily with them or as a family
- **38%** The factor by which women are more likely to bring their children to golf than men
- **720** more children that 1,000 new female golfers could introduce compared to 1,000 men
- **7.13 million** Absolute number of children current female golfers could bring to golf
- **24.76 million** Potential junior golfers from latent female golfers in eight markets

We hope you find this report and customer insights useful and would encourage you to think about how this research could be turned into action at your golf course or in your golf business.

This is the first in a series of Global Customer Insights reports commissioned by Syngenta and we look forward to publishing these over the coming months.

If you have any questions, comments or ideas, please do contact us at: golf.syngenta@syngenta.com

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